

DATABASE – CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

A good Database is critical to fundraising and especially to the development of an annual campaign. There are many options available that will work for nonprofits organizations from free (Salesforce - basic) to very expensive (and complicated) like Raiser's Edge from Blackbaud. There are various applications and uses for the database:

Constituent Management

Constituent management is the traditional CRM equivalent of contact management. The difference, of course, is that constituent management can include donors, vendors, foundations, volunteers, alumni, students, and other groups. It also includes tools ranging from basic contact records to type classification, donation history, memberships, and social media engagement.

Event Management

Not all nonprofit CRMs offer event planning and management tools, but if your organization frequently plans charity dinners, auctions, conferences, etc., this feature is a must-have. The more competitive CRMs will let you schedule events, send invitations, track RSVPs, create seating charts, and let your team members check in and access this data from their mobile devices.

Campaigns

Marketing campaigns are the primary means for a non-profit organization to keep its constituents informed and solicit donations from new prospects. As sales are to profit-model businesses, so fundraising campaigns are to nonprofits. Luckily, you don't need to spend hours designing pamphlets in Microsoft Office or adding email recipients to a newsletter one-at-a-time. Most nonprofit CRMs have helpful marketing automation features for multiple types of campaigns (email, direct mail, SMS, etc.).

Donation Management

Getting down to the nuts and bolts of fundraising, you'll need a way to process donations when they happen. In the interest of seamless customer experience, it's important to keep your organization's payment options flexible so you can take donations in more than one channel. Choose software with integrated payment processing (credit/debit card, ACH) and check-scanning to win here. Some CRMs also offer integrated accounting and budgeting features or the ability to export data to external accounting software.

Analytics and Reports

Traditional CRMs are notorious for collecting vast amounts of data, but not as well known for making good use of it, and nonprofit CRMs are no less vulnerable to this pitfall. Make sure you choose a product designed to make analysis easy, which means a platform that helps you segment constituents and take a targeted approach to relationship management. Easy analysis means predictive intelligence that lets you plan ahead, and that clarifies your perspective by displaying data in clean, customizable dashboards.

TechSoup Recommendations:

From TechSoup (TechSoup Global, founded in 1987 as CompuMentor, is a nonprofit international network of non-governmental organizations that provides technical support and technological tools to other nonprofits)

Free to Acquire, but Not to Maintain

CiviCRM

CiviCRM is an open-source, web-based CRM system offered for download at no charge. However, you'll almost certainly need a consulting firm to configure the software to your nonprofit's specific needs. Luckily, CiviCRM consultants are becoming easier to find, and there's an active community of nonprofit users who help develop and beta-test new developments. It's quite strong in helping you keep track of your constituents, households, and donations, and offers helpful event management and broadcast email functionality as well.

CiviCRM does have a few drawbacks — if your organization requires a CRM with sophisticated accounting and billing features, you may want to choose another system, as CiviCRM will require a lot of additional work. The user interface isn't always the most intuitive, either, although many improvements have been made in the past few years.

With customization, though, it's a system that could help your organization function more smoothly. Some of the out-of-the-box functionality includes CiviCase, a basic case management system; CiviSchool, which is meant to manage educational programs; and a new feature called CiviBox Office, which allows for sophisticated, airline-style seat selection for ticketed events. Beyond these ready-to-go modules, customization of the software could cost anywhere between \$2,000 and \$50,000, based on the complexity of the organization's needs. A consultant would almost certainly need to manage the customization, and could also manage the migration from your previous system and any technical support that might be needed down the line.

Salesforce

Salesforce is a CRM platform used widely in the for-profit world. The company offers up to 10 user licenses of the Enterprise edition, one of the tiers of the system, free of charge to qualifying organizations. Salesforce also has an implementation called the Nonprofit Starter Pack that's ready-made to fit the needs of nonprofits. The system is cloud-based and doesn't require dedicated hardware or a server. Strong in household management, donation management, and member management, Salesforce is not as strong out of the box in event or case management.

A defining feature of Salesforce is the App Exchange, a bustling online marketplace where developers sell applications designed to sit on top of the platform. There are hundreds of apps for sale, and many have been designed especially for nonprofits. These are usually offered on a monthly subscription basis, and the cost can add up, but it can also add substantial capabilities to the system.

For smaller nonprofits, Salesforce is technically free, but to properly configure and support the system, you'll need the services of someone tech-savvy enough to navigate its substantial technical intricacies and possibilities. For instance, the apps you'd need to assemble a system that meets the requirements for most religious organizations could potentially cost you thousands of dollars per year. Larger nonprofits that need more than 10 user licenses would need to negotiate a contract with the company.

CRMs with Subscription Costs

SugarCRM

SugarCRM is an open-source, web-based CRM system designed for for-profit businesses. The system vendors make no bones about their desire to challenge Salesforce for the title of most widely used CRM for enterprise. Consultants for the tool have also begun to court the nonprofit sphere.

SugarCRM is a powerful and user-friendly system but doesn't have a widely available customization for nonprofits like the other tools profiled here, so a consultant would have to build in donation management, event support, and other basic features. Almost all of the out-of-the-box language is geared toward the sales process, although the fields and modules can be modified extensively. Still, many basic features that nonprofits need will require workarounds, and SugarCRM doesn't have the ability to integrate with a nonprofit's website as seamlessly as do other CRM products.

An organization looking to implement SugarCRM would need to work closely with a consultant to tailor the software to the organization, but once the customization process was completed, SugarCRM might be a helpful relationship management tool. Pricing for SugarCRM is based on a tiered system — there's an open-source implementation called the Community Edition, which is free. Most nonprofits would want to start at the higher-level options, which range between \$420 and \$1,200 per staff user per year. And a consulting company would charge fees around the \$10,000 mark to get the system up and running.

Microsoft Dynamics

Microsoft Dynamics CRM is the software giant's answer to an integrated CRM system, and is designed to be an all-in-one database accommodating all of an organization's needs. The Nonprofit Template, developed by Microsoft and available at no charge to sit on top of the CRM, transforms the out-of-the-box sales-centric tool into a nonprofit-centric platform. The system is pretty user-friendly, especially if you're used to Office products, and is able to handle donation management, reporting, member management, direct mail correspondence, and email. Event management and web portal capabilities are available for an extra fee but require additional configuration and more advanced technical knowledge to implement.

Other Options

Other vendors have harnessed the power of CRM and offered managed packages, or products you can subscribe to that are built on CRM platforms but marketed toward specific segments of the marketplace, like cultural organizations. These come with most of the features you'd need already built in, and usually require a monthly or annual subscription.

TechSoup Conclusion

Whether with volunteers, donors, constituents, lawmakers, or anyone else, your nonprofit relies on its relationships to do the day-to-day work that effects change in the world and meets its mission. Managing those relationships is an ongoing challenge, but finding the right tool makes it easier by eliminating unnecessary obstacles and helping you focus on the personal aspect of these relationships.

A CRM isn't the solution for every organization, and those with specialized needs or highly focused interactions may benefit from a more specific system. It's not uncommon for donors to also be volunteers, or for constituents to donate. By tracking your relationships and making records quickly and easily accessible, a good CRM facilitates your work by letting you map the way people truly interact with your organization — even when those interactions overlap.

End TechSoup Recommendations

Other Software Providers:

DonorPerfect

DonorPerfect comes in a cloud-based or installed version and is a great option for smaller organizations seeking growth through the use of donor management software. It offers some fairly impressive features for the price, such as built-in tools for planning special events and predictive prospect analysis that calculates donor giving-capacity based on a set of 27 variables. DonorPerfect uses Weblink to create and manage online forms for a variety of nonprofit needs like donations, gifts, memberships, volunteer and event sign-ups, auction sales, and information requests. Other features include PCI-compliant payment processing, Quickbooks and MS Office integration, over 100 built-in reports, along with a custom report writer.

Though it emphasizes nonprofit fundraising, DonorPerfect also enables you to manage relationships with other constituents such as volunteers, board members, and event attendees in one database that's accessible through an iPhone and Android compatible web interface as well as in the office.

Though it's a comprehensive product, DonorPerfect does lack inventory management abilities, which could be a deal breaker for nonprofits that frequently deal in quantifiable goods and services.

DonorPro Suite

DonorPro offers an array of cloud based and on-premise solutions for nonprofits, including this integrated product suite for fundraising, CRM, marketing automation, web, and mobile functions.

The suite is built around core CRM functions, which include donor and volunteer management, event planning, integrated marketing, inventory management, and analytics. The fundraising functionality is just as robust, supplying users with the ability to process payments, create web

content and forms, host online auctions, create emergency appeals, and conduct peer-to-peer fundraising.

You might pay a little more for the integrated fundraising suite, but with an all-inclusive price point that locks in the rate and future upgrades, regardless of how many users you have, it's worth the expense. DonorPro doesn't offer much in the way of API access though, which could be a stumbling block if you're IT savvy and looking to customize the program beyond the basic offering.

OTHER RECOMMENDATIONS FROM ONLINE SOURCES:

You're a small nonprofit, which means your budget doesn't have much room to, well... budge. And that's okay, because these options won't break your bank and they will offer the donor management basics.

BatchBook

"Technology should never replace human interaction. Instead, it should enable it in creative ways."

Store your contacts in the cloud. Batchbook gives you a free 30 day trial. Organize your contacts, build better relationships with your donors and collaborate with your team members. ***BatchBook starts at \$35 per month for an unlimited number of users.***

DonorSnap

The multiple reporting tools offered by DonorSnap help make this donor management system unique. From standard reporting to QuickBooks integration and more, up to five different reporting tools are offered. ***DonorSnap only costs \$39 per month, but also has a \$200 one-time setup fee.***

NonprofitEasy

After realizing a need for donor management in the community, NonprofitEasy was formed. For the NPE Lite package, your organization can have one user, up to 1,000 contacts and 10,000 annual batch e-communications. Plus, support is offered. ***NonprofitEasy starts at \$20 per month.***

Medium-Sized Nonprofits

You're smack dab in the middle. You've got a little bit of money to invest in donor management, and your number of constituents is growing. But you don't have the budget to spend an arm and a leg. These middle donor management systems are for you.

Avecra netFORUM

Get all of your organization's information in one centralized database. You'll also get integrated member data and will be able to manage members, chapters, non-members and other relationships that are important to the success of your organization.

From social profiles (Facebook, Twitter, etc.) to social events and membership, AVECtra allows you to track a wide range of profiles for effective donor management. ***Pricing available upon request.***

Bloomerang

“It’s not about you, it’s about the donor.” And your donor retention rates are up front and center on the dashboard so you know exactly how your organization is doing. You’ll also get a view of each individual constituent’s giving history. Their engagement is measured in “cold,” “warm,” “hot,” and “on fire!” Plus, you’ll get smart reports, a timeline of individual constituents, access to email distribution designed to increase retention and printed direct mail pieces.

The [middle package](#) offered by Bloomerang is for 5,001 to 15,000 records. ***Your organization will pay \$299 per month for an unlimited number of users and free email and online support.*** Other packages start at \$99 per month for up to 1,000 records or \$499 per month for up to 40,000 records.

Blackbaud Products

eTapestry

The cloud gives you the ability to access your unlimited contacts and unlimited users from anywhere. One database manages your supporter relationships and their gifts, pledges and payments. ***The middle package runs for \$199 per month with up to 5,000 records.***

Blackbaud: Luminate CRM

Luminate CRM is owned by Blackbaud, a nonprofit software solutions company, and is built on the Salesforce platform. Though that may be confusing, it’s important to know, because it means that Luminate is designed by a company already devoted to helping nonprofits, and it taps into the formidable power of Salesforce.

Luminate is cloud-based and takes a three-pronged approach, focusing on unified data management, innovative technology (mobile access, AppExchange, custom user-access), and integrated marketing features. Within these categories, Luminate draws from a complete kit of essential nonprofit functions, such as constituent metrics, web forms, email marketing, market segmentation analytics, document sharing, and predesigned integrations for Outlook, Office, and Google Apps. Since Luminate is built on the Salesforce platform, if the out-of-the-box features aren’t enough, you can purchase more specialized features from the AppExchange store.

The possible downsides to this CRM are the lack of grant management and [inventory management](#) features.

Raiser’s Edge – Very expensive, very complicated, for major institutions and large nonprofits.